



State of California

Employment Training Panel

Arnold Schwarzenegger, Governor

March 26, 2010

Jeffrey Overmyer, Principal
OMB Electrical Engineers, Inc.
8825 research Drive
Irvine, CA 92618

Dear Mr. Overmyer:

**RE: Final Small Business MONITORING MEETING REPORT for
OMB Electrical Engineers, Inc. – ET08-0468**

Date of Meeting:	3/24/10
Beginning/Ending Time:	N/A
Date of Last Meeting:	8/27/09
Meeting Location:	Via Conference Call
Persons in attendance:	Cristina Leivas, Business Manager, OMB; Barry Menzel, Training Funding Source (Administrative Subcontractor); and Krista Campion, Contract Analyst Employment Training Panel ETP Analyst
Action Required:	No

CONTRACT INFORMATION

Term of Agreement:	5/05/08 – 5/04/10	Agreement Amount:	\$56,160
Training Start Date:	5/23/08	No. to Retain:	30
Date Training must be Completed:	2/03/10	Range of Hours:	8 – 120
Type of Trainee:	Retrainee	Weighted Ave. Hours:	72

ACTION ITEMS REMAINING FROM THE PRIOR MEETING:

None

SACRAMENTO CENTRAL OFFICE
1100 J Street, 4th Floor
SACRAMENTO, CA 95814
(916) 327-5640

N. HOLLYWOOD REGIONAL OFFICE
4640 Lankershim Blvd., Suite 311
NORTH HOLLYWOOD, CA 91602
(818) 755-1313

S.F. BAY AREA REGIONAL OFFICE
1065 East Hillsdale Blvd, Suite 415
FOSTER CITY, CA 94404
(650) 655-6930

SAN DIEGO REGIONAL OFFICE
5353 Mission Center Road, Suite 110
SAN DIEGO, CA 92108
(619) 686-1920

- **HISTORY OF AGREEMENT CHANGES**

The Agreement was executed on 5/20/08. Training commenced on this project on 5/23/08 and the last day of ETP training was 2/03/10, which allows for the 90-day retention period to be completed within the term of the Agreement – 5/04/10.

ETP processed one Notification and two Agreement Modifications during the term of the Agreement. OMB notified ETP of the change in the contract representative to Cristina Leivas on 10/22/08. Modification/Revision No. 1, executed on 3/24/09, extended the term ending date from 5/04/09 to 5/04/10. Modification/Revision No. 2, executed on 10/01/09, revised the range of training hours from 8 – 90 to 8 – 120.

- **INTERVIEW WITH CRISTINA LEIVAS, BUSINESS MANAGER**

This project was designed to provide 30 frontline workers with training in Business Skills, Computer Skills, and Continuous Improvement. Ms. Leivas reported that, overall, ETP helped establish a formal training culture at the company and provided the company with an opportunity to help advance the job skills of electrical engineers and designers. She reported that as a result of the Business Skills training, workers have increased their design and knowledge skills in Electrical Engineering & Building Skills Requirements, and in LEED (Leadership in Energy & Environmental Design). Additionally, she stated that as a result of the Computer Skills training in REVIT – a building information modeling software – the company has increased its client base due to the improved skill levels of the workers.

Ms. Leivas also reported that, due to business and production requirements at the end of 2009 and into 2010, the company was unable to complete all originally-planned training. As a result, OMB will not earn the maximum contract amount (see projected earnings below).

PROJECT STATUS PROVIDED BY THE CONTRACTOR

Trainees Started Training:	33	Completed Maximum Hours:	0
Trainees Enrolled:	34	In Retention Period:	17
Dropped Following Enrollment:	6	Completed Retention:	11
No. Completed Minimum Reimbursable Hours (8):	28		

PROJECTED EARNINGS / NUMBER TO RETAIN

Ms. Leivas reported that 28 retrainees (93% of planned trainees) have completed training, which is confirmed in the ETP class/lab tracking system, of whom 11 retrainees have completed the 90-day retention period. The remaining 17 retrainees all are projected to complete their retention periods by 5/04/10. The per trainee

reimbursement for class/lab training is based on the total actual number of training hours completed for each trainee, provided the minimum (8) and no more than the maximum (120) class/lab training hours are completed, and all other Agreement terms and conditions are met.

The 28 retrainees referenced above have completed from 8 to 116 hours of class/lab training, for a grand total of 1,598 hours of training. **This equates to a potential reimbursement of \$41,548, assuming that all Agreement performance requirements are met.** This amount is approximately 74% percent of the Agreement amount.

CLOSEOUT INVOICE

Ms. Campion advised Mr. Menzel that the final closeout invoice is due to ETP within 30-days after the end date of the Agreement or by 6/04/10. To date, OMB Electrical Engineers, Inc. has been reimbursed by ETP a total of \$12,539 in *unearned* progress payments.

AUDIT

OMB Electrical Engineers, Inc. will be notified in writing if this Agreement is selected for an audit, conducted either at your site (field audit) or by telephone (desk audit or "review"). The Audit Notification and Audit Confirmation letters will be sent in advance to allow ample preparation time and will include a list of documents that will be examined by the auditor. To provide support of training, original training attendance documentation is required; photocopied records are not acceptable. Listed below are types of records typically requested during an ETP field audit:

- Training attendance records such as rosters, sign-in sheets, etc.
- Payroll records of individual trainees to verify wage and hours worked
- Personnel records regarding occupation and dates of employment
- Documentation of employer paid health benefits (if applicable)
- Cash receipts to verify receipt and accounting of ETP funds

RECORD RETENTION

Records must be retained within your control and be available for review at your place of business within the State of California. This responsibility will terminate no sooner than four (4) years from the date of the termination of the Agreement or three (3) years from the date of the last payment by ETP to the Contractor, or the date of resolution of appeals, audits, claims, exceptions, or litigation, whichever is later.

If you have any questions or comments regarding the information in this letter, please contact Ms. Campion at 619-686-1917, or at kcampion@etp.ca.gov, within ten (10) working days from the receipt date of this letter.

Sincerely,

A handwritten signature in cursive script, appearing to read "D. Torres".

Diana Torres, Manager
San Diego Regional Office

A handwritten signature in cursive script, appearing to read "Krista Campion".

Krista Campion, Contract Analyst
San Diego Regional Office

cc: Cristina Leivas, Business Manager, OMB
Maggie Menzel, Administrative Subcontractor
Kulbir Mayall, ETP Fiscal Manager
Project File
Master File
Final Report File